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ABSTRACT

This document describes the processes involved in writing an effective user manual intended to give the reader a working knowledge of a computer program named FUND-RAISER. Written in UCSD PASCAL, FUND-RAISER was developed by the Winter Park Library Association to ease the record keeping and letter writing tasks involved in the association's annual fund raising campaign for the Winter Park Public Library. FUND-RAISER is a database application program that stores all patron records with their matching histories and produces a variety of customized reports on demand. This descriptive document includes the following: (1) introduction to the fund-raising activities of the Winter Park Library Association; (2) definitions of relevant terms; (3) the background and significance of appropriate documentation; (4) the procedures used in writing the manual; (5) a list of attributes of an "effective" user manual as determined by a literature review; and (6) discussion and implications of the documentation writing effort. A 10-item bibliography is included. (THC)

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A USER MANUAL FOR FUND-RAISER: A MICROCOMPUTER APPLICATION PROGRAM DEVELOPED BY THE WINTER PARK LIBRARY ASSOCIATION, INC.

By

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ABSTRACT

Documentation in the form of a user manual is used to explain what a computer program does and how it works. A two step procedure was used to write a user manual for the computer program named FUND-RAISER. First, possible problems were identified, then the text was written incorporating solutions to those problems. A user manual was important to the successful implementation and use of the program.

INTRODUCTION:

The Winter Park Library Association, Inc. is a private, non-profit corporation located in the town of Winter Park. The Association operates the Winter Park Public Library for the benefit of the residents of Winter Park. Although the town contributes the yearly operating expenses, the Association Board of Trustees is responsible for raising the funds for capital expenses such as furnishings and equipment. The success of these annual fund raising campaign is vital to the survival of the library.

The fund raising is done by direct mail and personal appeal. Nearly two thousand letters are mailed to library supporters every November. Each letter is individually imprinted with the name, address, and correct salutation for the recipient; matching envelopes are also typed, all by hand, one at a time. The labor involved in preparing the letters and manually maintaining the related records requires that an extra part-time person be added to the library staff during the fund raising "season". The FUND-RAISER program was conceived in response to a desire to expand fund raising efforts and to become more effective and efficient in those efforts without an increase in staff.

FUND-RAISER is a microcomputer-based application program written in UCSD PASCAL. The program was developed by the Winter Park Library Association, Inc. to ease the record keeping and letter writing tasks involved in the Association's annual fund raising campaign. The program does more than print personalized solicitation and acknowledgement letters and envelopes. FUND- RAISER is a database application program that stores all patron records with their matching histories and produces a variety of customized reports on demand.

DEFINITIONS:

ASSOCIATION is the Winter Park Library Association, Inc.

DOCUMENTATION is the supporting references for the program. The purpose of documentation is to give the reader a working knowledge of the program.

CAPITAL EXPENSES are the expenses incurred in replacing, expanding, and improving business facilities. Capital expenses include such items as equipment, furniture, and parking lot bricks (pavement).

FUND-RAISER is the database application program designed and written by staff of the Winter Park Library Association, Inc. The program was written in PASCAL and resides in the Association's computer system.

LIBRARY is the business operated by the Winter Park Library Association, Inc. and both terms are used interchangeably to refer to the same corporate entity.

OPERATING EXPENSES are the expenses incurred in the daily routine of the business including salaries and utilites.

RUN-ONLY USER is a person who uses the program to perform the tasks for which it was designed. This user is not concerned with programming.

USER MANUAL is a form of documentation that describes what the program does and how it odes it. It tells the user what information is needed, how to enter it, and how the output will be formatted.

THE WINTER PARK LIBRARY ASSOCIATION, INC. is the operating and governing body of the Winter Park Public Library. The Association is a private non-profit corporation that is not affiliated with the local city or county governments.

PROBLEM:

The only written documents for FUND-RAISER were the design notes and program source code, both of which were meaningless to the intended users of the program (library clerical staff). A good manual for staff training and reference was needed.

BACKGROUND AND SIGNIFICANCE:

Good documentation is very important to the successful implementation and use of a computer program. Documentation in the form of a user manual explains to the user what the program does, and how the program works. Indeed, the user manual is so important that the concern should be "not who should write the manual, but that it gets written, is accurate, and helpful to the reader" (Spear, p. 2 1984). A program such as FUND-RAISER, which is designed for the run-only user, has especial need for a good user manual: The manual is the only information the user will have about the program.

Because there was no manual for FUND-RAISER, the computer operations librarian had to train each user by sitting at the computer with them until they become

familiar with the program. This method was time consuming and inefficient, not to mention expensive in terms of staff. Additionally, the FUND-RAISER program was not used when the librarian was out of the library (vacation or business) because she was the only source of information about the program. This situation placed undue pressure upon the computer operations librarian and was not to the library's advantage.

In the small but growing body of literature dealing with computer user manual writing and evaluation certain problem areas were identified. One problem was identified by every author consulted: That of identifying the user for which the program is intended and then writing the manual for that user's level of understanding and expertise. Both McGehee (1984) and Spear (1984) consider the problem of identifying the user to be the primary task of the manual writer and devote the first chapters in their books to this issue.

The second problem in user manuals is the use of symbols in the text: Such symbols as <CR>, RETURN, and ENTER are ambiguous. McDaniel and Hershenow (1982) consider that the use of such symbols without clear definitions to be the main source of confusion to the user reading the manual. A related problem is the writing of manuals using jargon rather than clear, simple English.

PROCEDURE:

The writing of the user manual for FUND-RAISER was done in two stages: First the relevant literature was consulted for ideas of what should (and should not) be included, secondly the manual was written incorporating those ideas with the specific needs of the Winter Park Library Association, Inc.

The manual was initially written and formatted using WordStar, a word processing program, and the Zorba microcomputer. The resulting text was printed on the Association's NEC 3530 Spinwriter. An aditional "working" copy for use by the programmer to record changes was also printed.

RESULTS:

The literature review resulted in the compilation of a list of attributes of an "effective" user manual:

1. The manual should state what level of user expertise it is written for. It should also state what knowledge, if any, the author assumes the user to have.

2. The manual should be written as claerly and simply as possible. Definitions of terms and symbols used should be included and use of same should be consistant.

3. A step-by-step tutorial to illustrate the program's operation should be included.

4. The manual should be illustrated with screen images and samples of all printed output to help explain the text. Diagrams and flowcharts may also be helpful.

5. The manual should include a list of common errors and an explanation of what to do about them.

6. A good index and table of contents is important in making the contents of the manual accessable.

7. The manual should include command summaries or a quick reference card.

8. The layout of the manual should be neat and inviting to the reader.

The actual manual titled "FUND-RAISER: a user manual for the Winter Park Library Association, Inc. is available from the Association.

DISCUSSION AND IMPLICATIONS:

The FUND-RAISER program was written in modules that are linked together by a common menu. The manual was written following the program model with each chapter describing a separate program module. The manual was written one chapter at a time as the program modules became operational.

Identifying the users of the program was not a problem: They had been identified at the very beginning of the program design process as being the clerical staff of the library. The manual was written with the assumption that the reader had no previous computer use experience

because the majority of the library staff have never used a computer.

The symbols used in the manual correspond to the symbols used on the keyboard of the library's computer. This was a simple solution but ideal for this situation as the manual is meant to be used by a person sitting at the keyboard. Each symbol was defined the first time it appeared in the text so that the reader would have no doubt as to what it represented.

The manual illustrates the use of FUND-RAISER in a step-by-step fashion; each step is illustrated with pictures of the screens encountered. Every screen field is identified and defined. Appendixes contain "shortcut" instructions, samples of all printouts (letters and reports), and lists of the symbols used to identify Trustees and special patron status.

The text was written as clearly as possible. The text was read and tested by several staff members during the writing process. Areas that were found to be unclear or ambiguous were rewritten. Changes will be made to the text as necessary for further clarification and to accomodate program changes.

Effective system design does not automatically result in the production of an "good" user manual. It is easy to put off thinking about the user manual until the writing of the program itself is completed and easier still to ignore the task altogether. Putting off or ignoring the need for a user manual is not good; the program "expert" may be transferred or quit, the same could happen to any personnel that the expert had trained. An organization cannot afford to find itself in possession of a computer program that no one can use and data that cannot be accessed.

The user manual prevents problems by providing the information needed to use the program in a form understandable to anyone. It is not important that the manual be perfect, only that it exist.

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